Connect Release Features

Release date: August 2025
Version: 2025.08.40

Summary:

- Added new features to Caselle Connect version 2025.05. [PDF] [MP4]
- Click here to view a detailed list of additional fixes to version 2025.05.

Severity Rating:

- Caselle categorizes this as a regular update and recommends downloading this update. Run **System Management > Installation > Install Program Updates** to download version 2025.08.

Database Updates

All Applications, Security, Accounts Payable, Accounts Receivable, Business License, Cash Receipting, Community Development, General Ledger, and Payroll.

All Applications

Connect

FTP Interfaces

- We added functionality to use a key file and passphrase. [More]

Document Management

Document Management Interface

- We added the ability to load a pending invoice from a scanned image.

System Management

Schedule Tasks

- We added the ability to schedule the Create ClearGov Reporting File routine in the General Ledger application.

Financials

Accounts Payable

Watch a video [MP4]

Create Recurring Invoices

- We excluded terminated vendors from the recurring invoice list.

Invoice Approval Status Report

- We added this report to view invoices being routed through an approval process. [More]

Vendor Inquiry

- We added the ability to view merchant invoice information on the Totals tab. [More]

Accounts Receivable

Watch a video [MP4]

Billing Codes

- We added the Active Category checkbox so you can deactivate billing codes that are no longer needed. [More]

Categories

- We added the Active Category checkbox to deactivate categories that are no longer needed. [More]

Customer Watch List Widget (Connect Online)

- We added a new widget to the Connect Online Dashboard. [More]

General Ledger

Watch a video [MP4]

Create ClearGov Reporting File

- We updated the file layout to match ClearGov requirements. [More]

Create State Reporting File

- We updated the file layout to use the GL period as the transaction date. [More]

Cash Receipting

Watch a video [MP4]

Categories

- We added a new Community Development category for permit deposits. [More]

- We added a new Community Development category for project deposits. [More]

Checkout

- We added a Receipt numbers field that allows a single receipt number to be added one at a time to the search value. [More]
- We added a Receipt number range section that allows you to enter a range of receipt numbers for a single workspace receipt group. This option is an easier way to filter a group of receipt numbers by date, instead of using the selection criteria columns. [More]

Recalculate

- We added a Receipt numbers field that allows a single receipt number to be added one at a time as the search value. This option is an easier way to recalculate a single receipt, instead of using the selection criteria columns. [More]
- We added a Receipt number range option that allows a range of receipt numbers to be entered for a single workspace receipt group. This option can be used as an easier way to filter a group of receipt numbers instead of using the selection criteria columns. [More]

Web Services

- We updated the *create_receipt* mutation to account for permit and project deposit type transactions. This mutation will ignore the allocations parameter for these types of transactions and will allow a blank customer number to be passed for pending deposit records.
- We updated the *void_receipt* mutation to account for permit and project (Community Development) deposit type transactions.
- We updated the *receipt* query to account for permit and project (Community Development) deposit type transactions.
- We updated the *customer* query to account for permit and project (Community Development) deposit type transactions and the *accountBalance* value will return the permit/project deposit balance instead of the permit/project item balance.

Payrolls

Payroll

Watch a video [MP4]

Calculate Benefits

- We renamed the routine Calculate Benefit Amounts.
- We updated the routine when recalculating to keep transactions tied to a transmittal transaction. [More]
- We moved the Calculate Benefits routine to the old menu items. Use the Search box (at the top of the view) to look up Calculate Benefit Amounts (old).

Calculate Payroll

- We updated the routine when recalculating to keep transactions tied to a transmittal transaction. [More]
- We removed Calculate Payroll (old).

Calculate Transmittal Amounts

- We updated the look and feel of the routine. [More]

State Retirement Report (New Base)

- We added the ability to restrict *subject* wages based on hours limits.

Timekeeping

Watch a video [MP4]

Timesheets (Connect Online)

- We fixed an issue with how entries are tracked and displayed by time zone.

Communities

Community Development

Watch a video [MP4]

Managing Deposits Webinar [More]

Approval List Page (Connect Online)

- We updated the Approval column to display multiple approvals when a permit/project has multiple active/pending approval steps.

Deposit Register

- We added a report to provide a list of permits and projects with an open deposit balance or a deposit with a balance greater than $0. The report will also include any pending (unallocated) deposit records. [More]
- We added a Caselle master report definition titled Deposit Register - By Transaction Type.

Manage Deposits

- We added a view to apply, create, refund, and transfer deposit transactions for permit and project records. [More]

Modify Existing Permits

- We added a Deposits tab to show any related deposit activity on the permit.
- We added a notification to the toolbar for deposits.

- We added a warning when a valid completed date is entered on the permit and the calculated deposit balance does not equal zero. [More]

Modify Existing Projects

- We added a Deposits tab to show any related deposit activity on the project.
- We added a notification to the toolbar for deposits.
- We added a warning when a valid completed date is entered on the project and the calculated deposit balance does not equal zero. [More]

Open Deposit Report

- We added a report to provide transaction history for deposits and their related activity. [More]

Organization

- We added a Deposits field to the General Ledger Interface tab to store the general ledger account to use for deposit transaction records. [More]

Permit Detail Page (Connect Online)

- We added a Deposits tab to show related deposit activity on a permit. [More]

Permit Inquiry

- We added a Deposits tab to show related deposit activity on the permit. [More]
- We added a notification to the toolbar for deposits.
- We added a Deposit balance label to the summary section.

Permit List

- We added a deposit section to the report. [More]
- We added [Report].Deposit balance and [Report].Original deposit date as available columns.

Project Detail Page (Connect Online)

- We added a Deposits tab to show related deposit activity on a project. [More]

Project Inquiry

- We added a Deposits tab to show related deposit activity on the project. [More]
- We added a notification to the toolbar for deposits.
- We added a Deposit balance label to the summary section.

Project List

- We added a deposit section to the report. [More]
- We added [Report].Deposit balance and [Report].Original deposit date as available columns.

Setup New Permits

- We added a Deposits tab to add a deposit during the permit setup process. [More]
- We added an option to stop the cursor at the Deposit tab when you press Enter to move through the fields in the view.

Setup New Projects

- We added a Deposits tab to add a deposit during the project setup process. [More]
- We added an option to stop the cursor at the Deposit tab when you press Enter to move through the fields in the view.

Update General Ledger

- We updated the routine to account for apply and refund type deposit transactions. [More]

